

CMPOnline Advanced Document Generation

This document details advanced procedures to generate documents in CMPOnline.

If you have not already, read through our Basic Document Generation document or watch our Basic Document Generation YouTube tutorial, as they both go over setting up a template which will not be covered in this document.

Document Packages

Document packages are at the core of document generation in CMPOnline. Used to their fullest, document packages can set up one or more templates based on specified conditions, as well as automatically add billing, cost checks, and reviews to the file.

- Navigate to Administration > Lookups > Document > Document Packages
- Assuming a basic document package has already been created, select a document package, and click Edit, at the bottom of the screen.
- Under Document Package Details
 - Select a Billing Code
 - Billing codes must have a default time specified in its setup, under Administration > Lookups > Financials > Service Codes
 - For the billing code to work correctly, the client must also be configured with a hourly rate, under Contacts > Clients > Billing Settings
 - Select a Court Cost Code
 - This will use the codes default payee, setup under Administration > Lookups > Financials > Trans Type/Code
 - Select an Image Description
 - This is required if you wish to image your documents to the case file from the document generation screen.
- Under Components
 - Add templates along with conditions if you choose.
 - If there is no condition, the template will generate every time.
 - If there is a condition, the template will only generate when the condition is true.
 - Conditions use the same fields as the document merge fields seen when creating a template.
 - Conditions follow the syntax of [ExampleField] == "Example", where the field is in brackets and the filter is in quotations. (Example: [OpponentState]=="FL")
 - Conditions can also be chained together using "&&" for AND and "|" for OR.
 - It is a good idea to test conditions once done, to ensure accurate results.
 - To test, click "Test".

CMPOnline Advanced Document Generation

- Under Reviews
 - o Select Add New
 - Select a review type
 - Select add or remove
 - Choose Days Advanced if it applies
 - o Reviews can be added to a file to track when another action needs to be taken, based on the action of generating a document.

Generating Documents

You need to "Always Allow Popups" from this domain for document generation to work correctly.

- Navigate to Case File > Documents
- If you are only testing the documents, ensure that "Auto-Verify" is not checked in the top left of the window.
 - o If Auto-Verify is checked, documents will automatically be added to the notes along with when it was generated and reviews that were added or removed.
- Select the document package you wish to generate.
- Select the Account and Opponent
 - o If left blank, the first account and first opponent will automatically be selected.
- Click Generate Document
- Once the document is generated, you can:
 - o Edit
 - o Print
 - o Save
 - o Send to Imaging

Verifying Documents

If you do not select the Auto-Verifying when generating documents, you will have to verify them yourself.

- Navigate to Tools > Verify Documents
 - o For each document, select "Yes" to verify, "No" to not, or "Hold" to choose later.

Questions?

support@casemasterpro.com | (386) 675-0177